# IMAC Training and Technical Assistance Subcommittee Meeting Minutes May 18, 2004

Present: Deb Solis, Jenny Hoffman, Staci Wanty, Julie Loebel, Jeff Brikowski, Keli Poppy, Vicki Jessup, Theresa Fosbinder, Margaret Romens, Stacia Jankowski, Lynda Fisher

David Turk will be here to discuss latest distance learning initiatives. Theresa will cover technical issues for Tricia Bless.

#### **General IM and training updates**

- IT conference-Stacy helping to organize. Per Stacy registrations are down. Have room for more attendees (appr. 150 people). Conference is Wed. June 9<sup>th</sup> in Wausau at Plaza hotel. There will five presentations plus booths. Stacey stated there would be value for line Supervisors in addition to IT and Upper level Management. Theresa and Gerry will have distance learning presentation and remind people why we are doing this. There will be a distance learning booth also. Mark Schmitt will be there to answer technical questions. More marketing information will be sent out May 24 to encourage more people to sign up by the end of the week.
- WSSA-IM has four workshops. They are happening on June 17<sup>th</sup>.
  - 1. IM Overview
  - 2. Distance Learning
  - 3. FS program participation grant web self screener
  - CARES worker web
- IT training Calendar-Handout (see attachment 2)-Calendar only represents is what on Theresa's training work plan. Does not include all that is happening on IM side. State has staff training CAPO workers. Staffing changes at CAPO ie go from 3 eligibility workers to 16 and then back to 3. Brought in LTE trainer to work with them. Online handbooks are being updated and improved. Dave Hippler working on it using new software (Roboinfo). Eduardo is working on training materials for handbook improvements. Electronic Case File-training dates cannot be predicted right now. Only forms being scanned are EVF forms. Looking at pilots. Eventually will have all forms on electronic case files. LaCrosse, Dane and Pierce will be pilot counties. Workgroups comprised of State and local staff from the pilot counties are being formed to determine type of forms that will be scanned. Theresa and Stacy are working on FS Payment Accuracy Topics. They are in the process of figuring out what they learned from FS Application Processing training and if it impacted the error rate. Focusing on what is happening in Milwaukee. Theresa stated people liked that FS App. Processing was a refresher and process based. It will focus on error prone areas. CARES worker web (CWW) timeframe: Start with production mid-November, Pilot Nov. 29th, more pilots in Jan. During Jan and Feb, 2005 they will phase in counties. Early June, CARES coordinators will be notified that people can go to prototype and view. State will ask for feedback on specific screens and overall product. State staff will go out to Regional Meetings this summer to market. CWW staff will be soliciting free back from CARES users. Staff are working on improving Learning Mgmt System (PTS Learning Center) but still need better worker profile and better picture of courses that they are offering. Survey coming out in next month. Will ask people to update user profile and ask for few more bits of information. New worker programs are being worked on. Outreach training - FS and MA 101 for CBOs: Looking at how to store power points and make available to local agencies for training they do outside of their agencies. Group agreed the materials would be valuable. Julie said that State trainers may be available to do these training also. Agencies should contact Julie and Stacia. Theresa asked if she should send out the calendar. She will e-mail it out to IM agency training contacts and investigate putting it on the web site.

#### **Updates on Issue Papers**

Our group was bumped up off IMAC agenda in April because of a WCHSA agenda item on the "Visions" proposal. This proposal would streamline funding rather than having it come down in silos. IM programs already working on this. At the April IMAC meeting Theresa presented a report of TATA activities. We were not able to present issue papers. Main issue seems to be presenting mandatory training issue at IMAC. Bureau Mgmt advised Theresa to 'slim down' initial issue paper and the present criteria to IMAC. Starting in '06 there is going to be new funding methodology based on work agencies does and how many cases they have. One of things they will pay agencies to do is to have staff participate in training activities (proposed 52 hours per year). Note: We will still need to complete RMS with new funding methodology.

Our task is to decide if we still want to recommend option 3, and if so, look at criteria and do we want to make FS reduced Change Reporting 2b mandatory. Question asked, what about doing group training. Theresa said that individual worker has to sign in to training and when they leave the training. For example, in current training workers have to go to start up and have to complete course evaluation. What happens in between is not tracked. Keli asked what happens if counties are having trouble accessing certain components. In the interim, how can staff get credit for completing. Discussion ensured about: Do we present to IMAC all three options or just the option our group recommends. Discussion about adding portion about requirement that worker has to sign in to PTS at beginning of training curriculum and the end of the curriculum to have credit as completion. Discussion about lifting 6 hour maximum of mandatory training counting toward 12 hours professional development. Group agreed that the 6 hour maximum should be lifted if we are going to start mandating training. Group still recommends mandating training based on criteria. We recommend the FS Reduced Change reporting 2b be mandated. Theresa will make revisions to issue paper and present to the IMAC. Theresa asked David Turk if we could make required vs. not required in the SMIRF training. David said there is capability to do that. Group agreed to add brief summary of options to the May version in the background portion. Group should review (if possible) before Theresa takes to IMAC on Thursday. Group reviewed criteria to make training mandated. Adding significant to bullet two. For example auto update. Refresher training will be captured in 4<sup>th</sup> bullet point.

#### See attachment 1 for updated paper as presented to IMAC.

Reminder: Group members are welcome to attend IMAC with Theresa anytime.

#### **Distance Learning Projects-David Turk**

- SMIRF's-
- Wis Line Web-updates that are coming along. 30 people attended Monday. Doing again Wed morning. They preview SMIRF training and other IM training events. It is possible to access these for 2 weeks after the events because they are archived by the University. Theresa is going to check about letting staff know about accessing the archive. SMIRF training will be formatted similarly to EV. Will require Authorware 7.0 for the training. Need full version. Under distance learning tab on training web site have links to places you go for download. Center of course is processing 6 cases. There will be simulated CARES screens. Estimated time for completion-3 hours. Group gave feedback that people did not know covering SMIRF's training but more thought the training was about Wis Line. Wis Lines need to be organized by categories i.e. series on train the train vs. actual training sessions.
- EVF-tried to take into account the feedback from RCR phase IIa. For example, people had trouble
  with large PowerPoint so they used Flash this time. Group gave Dave feedback on the training
  materials. Dave gave list of 5 things that had come up since the EVF implementation:
  - 1. Procedure existing cases-call center sent out work around
  - 2. Duplicate forms
  - 3. Customer signed his or her own name. If this happens, no sign alert will be generated. With be viewed validators.
  - 4. Agency faxing EDS
  - 5. Agency refusing to accept pay stub (Not correct)!!

#### **CARES Worker Web-Jim Jones**

Overview-CARES web-Hand out - see attachment 3

• State bought software and servers that comprise CARES web. There will be a CARES web site. One is **SelfHelp** Wisconsin-FS participation grant to build innovative web tool for people

Four parts:

- 1. Self assessment-up August 16<sup>th</sup>. Think it will take 15 minutes.
- 2. On-line application-a year from October
- 3. On-line reporting via internet
- 4. Query in CARES, MMIS, EDS

Several kinds of help:

System/field level help, policy help, process help and other resources.

Electronic Case File

Will replace local paper file. We will be storing all forms electronically. Timeline TBA.

On-line Handbooks-IM manual going on line. Hopefully available this fall.

MA-June FS-this summer IM-Fall

 CARES Worker Web-this November when you go to Client Reg to Appl Entry, they will be Web screens. Want to save local workers time. Also want to allow workers to interact with customers without staring at computer. Goals:

<u>Intelligent Driver Flow</u>-only ask questions needed for the programs requested. Going to do relevancy testing-who is relevant to case. Only ask questions in regard to these people.

<u>Easy to Learn</u>-All codes you see will be words so don't have to remember what codes are. Easy to use-want screens to be easy to view.

On-line access to policy, systems and process help

A delight to our users-screens should make you happy. First time you use you should smile.

Jim reviewed three projects for CARES Worker Web.

- Only thing changing is user interface, the internal body of CARES will not change. Clearance
  will be moved to worker rather than receptionist staff. In "Project 1.5" make web screens
  where workers could enter infor from MA paper application and then will generate letterletting customer know what is still needed. When completed-info populate to CARES.
- In future projects/phases they may tie Microsoft Outlook and CARES together for Client Scheduling.
- Client notices will be in nice fonts, etc. Client notices need to be in the web for them to be 'beautified'.
- 136 pages for web roll out for Client Reg. and Appl. Entry. There will be 10 summary screens. ACPA screens replaced with request screens. Case Comments-notebook throughout system, there will be word wrap.
- Simulation will exist.
- CC moving to a new system called C-Saw. Work programs may move to Asset. Dates TBD.
- All systems will interface. In handout, timelines of CWW project 1 are listed.
- New features to note: Priority service and expedited FS have been separated from each other. Absent parent screens are down to 5-6 data items. Changing third party liability-just display current stuff.
- When End User Feedback site is ready, we will be notified via IM newsletter, WSSA, IT Conference, regional meeting and send out to CARES Coordinators and Managers.
- Training will need to be designed and hardware and software requirements will need to updated at the County level.

### **CARES worker Web training Plan-Jeff Esterholm**

Training group meeting. Looking at training methods. Jeff has information about potential audience. Jeff sent out pyramid of audience. Looking at specialized training audience. Self assessment and self declare option discussed. Classroom and tutorial approach also discussed. The group also discussed having enhancement training later. Help will be built in. We also discussed desk aids for short cuts, bells and whistles.

#### Plan for next meetings-wrap up

Archive information for Wis line will be sent out.

Next Meeting
June 15<sup>th</sup> in Oshkosh

Agenda
CARES worker web
IT Conference Update
Debrief
SMRF's
Issue papers
Evaluations
July 20 in Madison-1 W. Wilson, RM B 141
August 17, Oshkosh

Minute taker: Margaret Romens

# RECOMMENDATION FOR CRITERIA TO DETERMINE MANDATORY IM TRAINING IMAC TRAINING AND TECHNICAL ASSISTANCE (TATA) SUBCOMMITTEE MAY 20, 2004

#### **OVERVIEW OF TATA**

The IMAC Training and Technical Assistance (TATA) subcommittee is comprised of representatives from large, medium and small local Income Maintenance (IM) agencies, as well as state staff representing several areas within the Bureau of Health Care eligibility (BHCE) and the regional offices. This subcommittee was formed at the request of the IMAC. IMAC members were interested in convening a group of local and state staff interested and experienced in planning and strategizing in the area of training – especially in light of the interest in exploring more distance learning techniques and delivery.

The subcommittee has been collaborating on IM training issues for the past 8 months. In that time, the group has worked to get up to speed on upcoming IM programmatic initiatives, as well as learning more about various technologies and strategies that support distance learning. This group has had direct input into various training processes, including providing feedback on the Food Stamp Application Processing training offered in late 2003, providing guidance regarding planning new worker classes, and helping create communication strategies to work with agency training staff on current distance learning programs like the Employer Verification Form Processing and Food Stamp Reduced Change Reporting initiatives.

As the TATA subcommittee moved forward with its work, it identified a critical factor that appears to be impacting the success and/or failure of IM training in Wisconsin. This factor is the lack of designation of any IM training programs as mandatory.

#### MANDATORY TRAINING DEFINITION

For purposes of this discussion, "mandatory" means: "the appropriate workers must complete the training course successfully".

(Note: At this time, completing a course "successfully" is synonymous with course completion, however in the future it could mean a certain level of proficiency.)

The designation of specific training programs as "mandatory" is not to be confused with the requirement to meet a number of training hours per DWD 23 and related administrative requirements as stipulated in DHCF Administrator's Memos.

### **BACKGROUND: MANDATORY TRAINING**

Currently, no IM training programs are being designated as mandatory, either for all IM workers or for specific worker types. Whereas some local agencies may have made training programs mandatory for their staff, the Department has not.

Among other issues, challenges have been that it has been difficult to measure whether or not staff have complied with mandatory training requirements, and to determine what consequences there should be for non-compliance.

Members of the IMAC TATA are concerned with the current approach because:

- If critical training courses are not taken, error rates may rise due to outdated worker skill sets
- There may be an increase in customer complaints/dissatisfaction due to untrained workers
- There may be an increase in worker dissatisfaction and turnover if workers do not feel properly trained and equipped to do their jobs

- It is harder to transition workers to the distance learning methodology that has been requested by local agencies and the IMAC. If training is not made mandatory, workers don't access the training courses and thus do not become accustomed to the new delivery methods
- Workload reduction initiatives cannot be successful unless workers are trained on how to implement them – if workers don't understand how to put the strategies into practice, workload may not be reduced and funds may be spent ineffectively.

For these reasons, the subcommittee feels that failure to develop a strategy and process for determining IM courses as mandatory could jeopardize the proficiency of the IM workforce, the ability to transition to a distance based training model, and positive payment accuracy outcomes.

The IMAC TATA subcommittee considered three options for creating such a strategy and process:

- Status quo make no IM training mandatory
- Make all IM training mandatory
- Develop criteria to identify mandatory IM courses

For reasons previously discussed, leaving the situation status quo was not considered a viable option. The second option, making all IM training mandatory did not seem to be realistic in terms of workload, compliance monitoring, and potential fiscal impact. Therefore, the group proceeded with an option that attempts to develop criteria to identify which IM courses should be designated as mandatory.

#### WHY SHOULD TRAINING BE DESIGNATED AS MANDATORY?

In order to alleviate concerns such as those listed, and to maximize the impact of training on process and payment accuracy, customer satisfaction, worker satisfaction/ retention, workload reduction, and the transition to distance learning, there must be IM training that is considered mandatory. Deeming training programs as mandatory could:

- Increase payment accuracy and decrease the error rate
- Establish training as a workload priority
- Increase buy-in for distance learning
- Serve as a step toward a competency based training model to increase worker proficiency and customer satisfaction statewide.

Because of the increased use of distance based programs, the availability and flexibility of training has increased - it is no longer necessary to wait for sessions to be offered in a particular area or for a slot to open. Distance learning also has the potential to lessen the overall cost of training, which could make the Department less hesitant to mandate training programs to local agencies.

In addition, the recent implementation of the PTS Learning Center (f.k.a. "BPS Registration Center", "Pathlore") provides more consistent access for training participants, as well as tracking and reporting that could allow determination of compliance with mandatory training requirements. So although consequences for non-compliance with mandatory training requirements may still need to be developed, the means to determine compliance now exists. Also, a new IM funding methodology for CY 2006 that may include training as a funded IM activity beginning in 2006 is currently being developed. At that point, the Department may be in a position to implement a set of criteria to determine mandatory training and related processes. Implementing such mandatory criteria and related processes now is a step in that direction, and

would allow training participants to adjust to this process well before it becomes a part of any revised funding methodology.

#### IMAC TATA RECOMMENDATION FOR MANDATORY TRAINING CRITERIA

Training programs/courses should be designated as mandatory by the Department (per the above definition of "mandatory") per set criteria that are applied consistently. Recommendations for these criteria are:

- The topic is a new policy initiative that is tied to an Ops Memo AND/OR
- The topic is a significant new process or automation change AND/OR
- The topic is a major CARES system change AND/OR
- There is potential impact on Food Stamp or Medicaid payment accuracy (error rate) As IM training programs are developed, their topics should be consistently evaluated against these criteria, and if any of them are met, the program should be designated, announced, and

these criteria, and if any of them are met, the program should be designated, announced, and tracked as a mandatory program. Consideration of impact on customer service and workload reduction should be part of this evaluative process.

The group would like the June Food Stamp Reduced Change Reporting Phase 2b training to be the first program to be designated as mandatory using the recommended criteria.

#### MANDATORY TRAINING AND PROFESSIONAL DEVELOPMENT CREDIT

In conjunction with implementing criteria to determine mandatory training programs, the subcommittee also requests that a change be made to an administrative requirement in DHCF Administrator's Memo 03-02. All mandatory training should count toward the required 12 hours of professional development, effective with the IM training requirements Administrator's Memo for calendar year 2005.

#### **CONSIDERATIONS**

- As this set of criteria for determining mandatory training, and any resulting process changes are implemented, appropriate communication to involved staff, as well as PTS Learning Center process changes will need to occur.
- A process for non-compliance with mandatory training requirements will need to be developed by the appropriate entities and communicated accordingly.
- It is expected that the PTS Learning Center (f.k.a. "BPS Registration Center", "Pathlore") will be used to track compliance with mandatory training requirements. State and local agency staff will work together to ensure that this happens in a timely manner, and that any IT problems or other issues are satisfactorily addressed.
- For face to face training that is deemed as mandatory, current PTS Learning Center registration and tracking methods will continue to be used.
- ◆ For distance learning programs that are deemed to be mandatory, individual interaction with certain pre-communicated components of each course will be required so that course access and completion can be tracked. This means each individual will need to sign on the PTS Learning Center site and complete these portions while signed on to the course.

Example - Food Stamp Reduced Change Reporting Phase 2b course: Participants will need to access the instructions ("Start here") and the course evaluation individually to obtain course completion status. Other components within the course (Phase 2a refresher, SMIRF processing simulation exercises, topical assessment) may be accessed either individually or as part of a group setting, but to achieve a course completion status, the instructions and the evaluation must be accessed individually.

### Outcome of IMAC meeting May 20 from e-mail to TATA dated 5/21:

Hi IMAC TATA subcommittee!

Attached please find the final issue paper on mandatory training the way it was presented to the IMAC yesterday afternoon. Thanks to all who contributed in person at the subcommittee meeting and/or by sending comments.

The IMAC met yesterday, and they decided they liked the idea of establishing criteria for mandatory training. They liked the direction that our list of criteria was taking, and asked that we do a little more work to refine that list some more - that can be an agenda item for our next meeting.

Also - they did decide that they would approve the FS Reduced Change reporting Phase 2b training to be mandatory!

They also discussed a timeline for how long this program should be offered - based on the fact that we think the CARES Worker Web will start to come along in the late fall and render some of these materials obsolete, they decided they liked the idea of offering this course from the week of June 14 through September 30. So that is the plan we will go with for now, although I still need to touch base with the training team on this project and make sure this is something that makes sense.

Thanks to you all for your work on this, and for your honest and constructive comments as we try to forge some new direction for IM training!

Thanks -

Theresa

Theresa Fosbinder
State of Wisconsin Department of Health and Family Services
Division of Health Care Financing/Bureau of Health Care Eligibility
Income Maintenance Training Coordinator
NOTE NEW PHONE NUMBER: (608) 261-8568

ATTACHMENT 2 – SAMPLE IM TRAINING CALENDAR: TOP: AS PRESENTED AT 5/18 TATA MEETING BOTTOM: AS REVISED AND SENT TO AGENCY IM TRAINING STAFF ON 5/24/04

# IM TRAINING CALENDAR As of May 17, 2004

#### • PLANNED TRAINING PROJECTS

Employer Verification Processing
 FS Reduced Change Reporting 2b
 CAPO SeniorCare Renewals
 07/04

Online Handbooks
 Electronic Case File
 FS Payment Accuracy Topics
 Summer and fall 04
 Dates TBD
 Late 04/early 05

- CARES Worker Web 10/04 - 06/05

#### • ONGOING TRAINING PROJECTS

- New worker offerings (see website for details)

- Outreach training for CBOs



IM TRAINING CALENDAR As of May 24, 2004					Partner Trainir Service
TRAINING TOPIC	AUDIENCE	APPROXIMATE DATE	ANTICIPATED DELIVERY METHOD	OTHER INFORMATION	
Employer Verification Processing	Workers whose caseload includes customers with income from employment.	Currently offered	Distance via PTS Learning Center	Components include: Instructions ("Start Here") - Central Processing Overview Presentation - CARES Screen Reference Guide - CARES Walkfroughs - Post Assessment - Course Evaluation	
Food Stamp Reduced Change Reporting Phase 2b	Mandatory training for Income Maintenance (IM) workers who perform functions in the eligibility determination and benefit calculation process for the Food Stamp Program.	Week of June 14, 2004 offered through September	Distance via PTS Learning Center	Components will include: Instruction ("Start Here") Phase 2a refresher SMIRF processing simulation exercises Assessment Evaluation	
SeniorCare renewal process 2004	CAPO staff	June - August 2004	Various	SeniorCare CAPO staff only	İ
Online handbook improvements	Online handbook users (Food Stamp and Medicaid handbooks, IM manual)	Summer/Fall 2004	Distance via PTS Learning Center	Medicaid handbook Summer 2004     FS handbook Late summer 2004     IM manual Fall 2004	
Electronic Case File (ECF)	IM staff, others TBD	TBD	TBD	ECF is currently being used for Employer Verification Processing only     Expanded capability of ECF is scheduled to be phased in over the remainder of 2004	
Food Stamp Payment Accuracy Topics	Income Maintenance (IM) workers who perform functions in the eligibility determination and benefit calculation process for the Food Stamp Program.	Late 2004 – early 2005	Distance via PTS Learning Center	Similar to "Food Stamp Application Processing: Essential Elements of Eligibility" offered in late 2003	
CARES Worker Web	All CARES users	October, 2004 – June 2005	TBD	Implementation and training plan specifics TBD.	
New worker classes	New workers	Ongoing	Various	See schedule at http://www.dwd.state.wi.us/dwspts/nw_im_schedu le_location.htm	
Outreach training	Community Based Organizations	Ongoing	In person presentations – FS 101: Medicald 101	Contact Theresa Fosbinder for more information	

ALL DATES AND EVENTS SUBJECT TO CHANCE. SEE Into liveux dust state at unidengal FOR DETAILS AS THEY BECOME AVAILABLE. FOR MORE INFORMATION CONFIDENT THE RESEARCH MIT PROMISE COORDINATOR FOR MORE INFORMATION CONFIDENT AND EXPENSE AND EXPENSE AND EXPENSE AND EXPENSE AND EXPENSE AND EX

ATTACHMENT 3 – CARES WEB PRESENTATION BY JIM **JONES** 

## Slide 1

# **CARES Web**

- SelfHelp Wisconsin
   Electronic Case File
   On-Line Handbooks and Help
   CARES Worker Web

### Slide 2

### CARES Worker Web

- Intelligent Driver Flow
  Easy to learn
  Easy to use
  On-line access to policy, systems and process help
  A delight to our users

### Slide 3

### CARES Worker Web

- Project L0

  Framework for Worker Web

  Infrastructure (servers, software, etc.)

  Client Registration screens ----> re-engineered process & page

  Application Entry (up to running eligibility)

  Some other screens that are part of AE intake, review, query and change (DXBM, etc.)

  Project L5

  Mail-In Applications and Reviews

  SeniorCare

  Project L0

  Eligibility and Post-Eligibility Screens (SFU, EDBC, Confirm)

  Client Scheduling

  Client Scheduling

  Client Scheduling

  Data Exchange

  Project 3.0

  Project 3.0

  Project 3.0

  Project 3.0

  Project 3.0

  Project 3.0

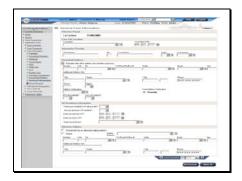
  Project 3.0

Project 3.0
• Everything Else

## Slide 4



# Slide 5



# Slide 6

# CARES Worker Web, Project 1

#### **Timeline**

- End User Feedback Site 5/17/04
   Systems Testing 7/10/04
   User Acceptance Testing 9/3/04
   Pre-Production Test 11/15/04
   Pilot Implementation 11/29/04
   Other Pilots/Statewide Roll-Out by 6/30/04

## Slide 7

# CARES Worker Web, Project 1

- Policy Help On-Line handbooks with just policy
  Process Help On-line help that describes all of the
  process, both in CARES and outside of CARES, to do case
  processing for our programs.
  Systems Help Page and Field Level help
  Other Resources Links to other helpful web sites (PTS, IMAC, etc.)